MULTICHANNEL NOTIFICATIONS FOR CREATIO
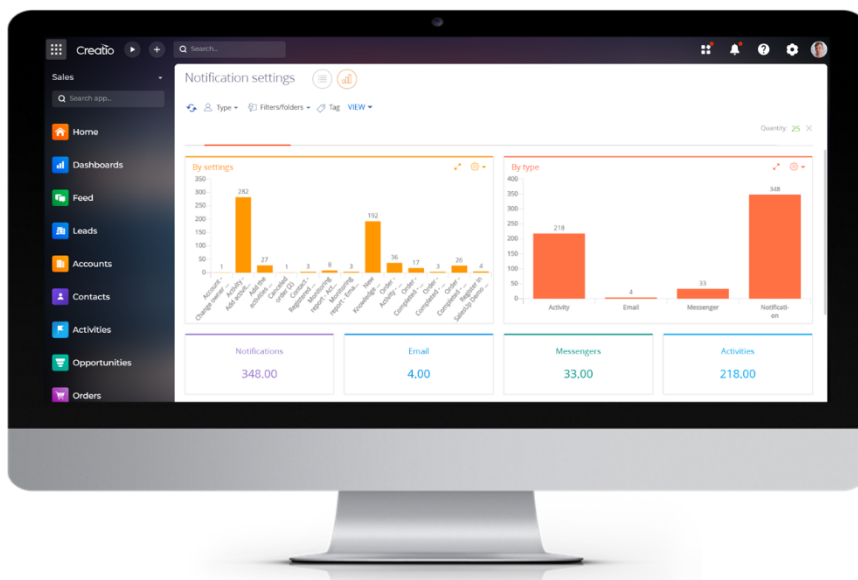

Guide to setup and utilization

16.01.2024

CONTENTS

Product description

The "Sales'Up Multichannel Notifications for Creatio" product is designed to automate the distribution of notifications to various business process participants, both within the system and outside it.

Implemented functionality:

- Simplifies tracking of important indicators of management accounting;

- Allows to increase the speed of response to negative/positive events;

- Allows CRM analysts to customize the rules of interaction with CRM without the participation of the developer;

- Has the function of sending messages to messengers;

- Helps in organizing working hours and communication between employees of different levels, departments, etc.

- Sends "PUSH" notifications to mobile devices (the mobile application must be installed);

- Flexible logic for creating a list of recipients is implemented. Ability to make exceptions to the list;

- Implemented the creation of draft emails with a pre-filled message based on a template and the ability to edit the text of the email before sending;

- Integrations for working with other products developed by Sales'Up are set up. For example, "Sales'Up Data Management for Creatio", "Sales'Up Approval for Creatio";

- Support of multilingual email templates creation.

The product is widely used in CRM and can be customized for any object in the system. For example, it can be used to:

- Track the debts receivable by account;

- Excess of actual expenses over planned ones;

- Over– or under-fulfillment of the sales plan by managers;

- Automatically create an activity in connection with an event in the system with the fields already filled in;

- Set up automatic sending of e-mails from a manager to a subordinate, client, or department;

- Send notifications/emails to users about the creation of new objects;

- Display warnings on the page about empty fields, etc.

Use cases

- Create general and directive mailings about events in the system;

- Sending notifications to users about the correctness/incorrectness of working with the product;

- Create notifications for users who work with mobile devices;

- Create pop-up system notifications;

- Create email templates for marketing campaigns;

- Create email campaigns by timer;

- Sending notifications about events in additional products of the system developed by Sales'Up, for example, "Sales'Up Data Management for Creatio", "Sales'Up Approval for Creatio".

Opportunities

- Set up an unlimited number of notifications;

- Customize notification templates in different languages;

- Automatic and manual sending of notifications;

- Setting up notifications to be sent to different communication channels: Push, system, e-mail, messengers, Activity;

- Customization of the recipient structure with the possibility of exceptions;

- Customization of the signal for sending a notification: object event, page event, date from the object column, timer;

- Flexible configuration of an additional filter for the trigger event;

Notes and restrictions

For the product to work, communication channels must be configured. Make sure that the contacts linked to the administration object, as well as the contacts who participate in the settings themselves, have the fields for the corresponding communications filled in.
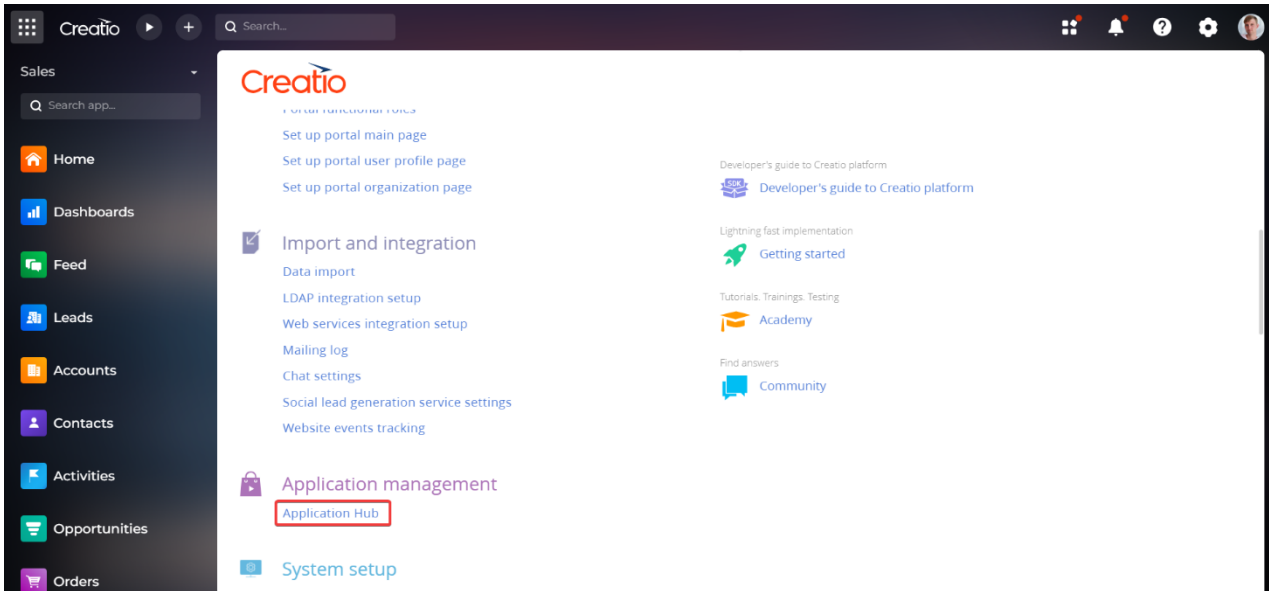
Technical requirements

The product is compatible with all products on the Creatio platform version 7.16.4 and later.

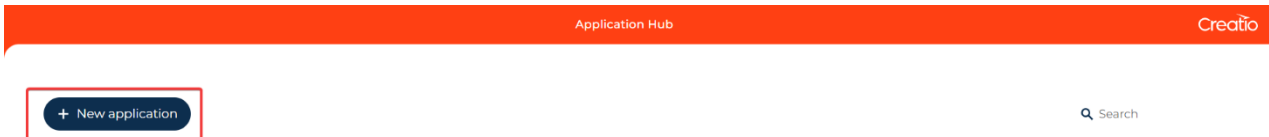# Installation and setup of the product

Product installation
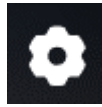
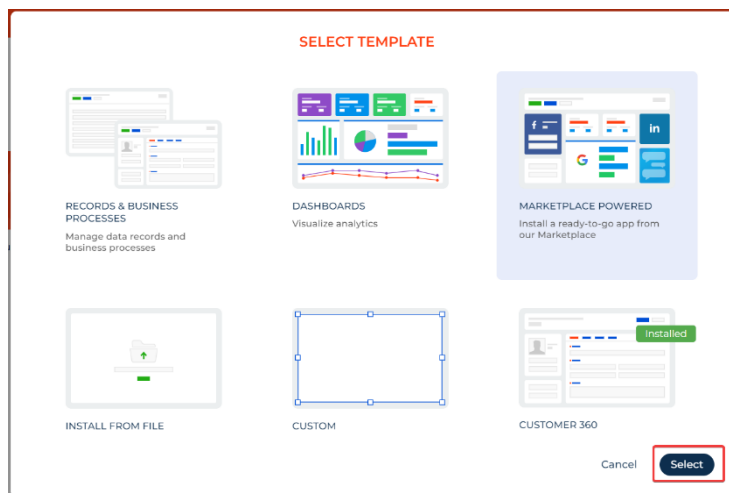To install packages, click the ![gear icon] button and go to the "Application Management" .

Next, go to the "Application Hub" section.

On the "Application Hub" page, click "New application",

Select the "Marketplace powered" block and click the "Select" button.

Click the "Install" button on the product page.

Enter the address of the Creatio website where you want to install the product.
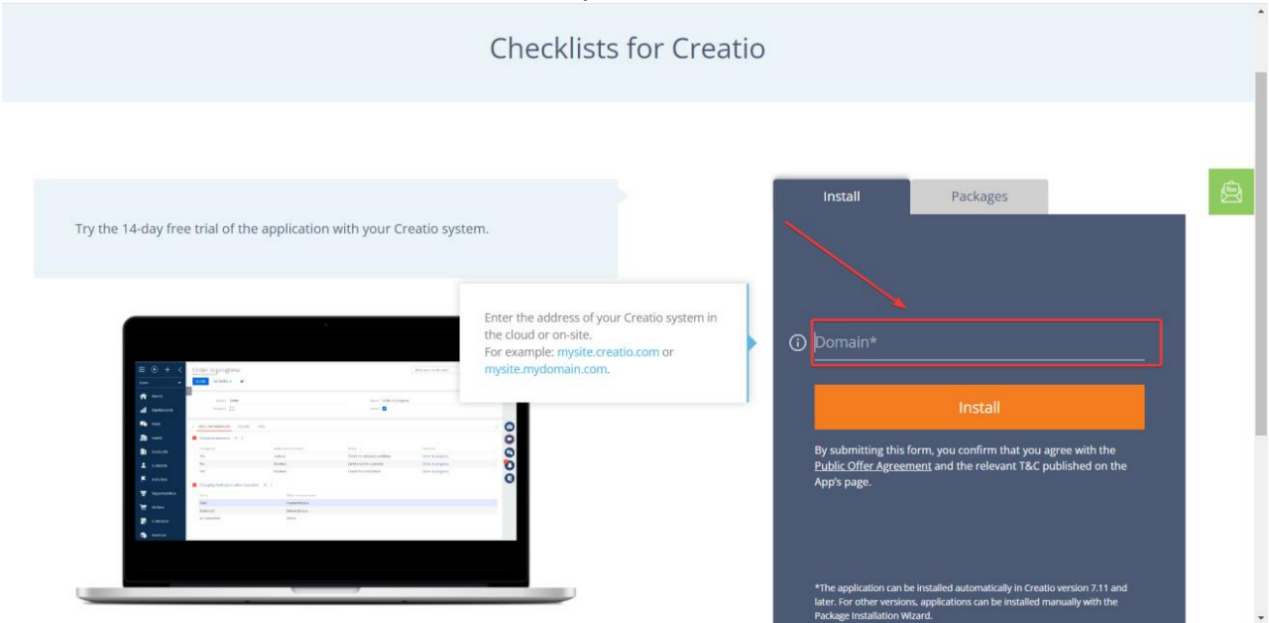
After the installation is complete, the Creatio website login page will open.

If you are installing a product package from a file, you need to request the latest package from Sales'Up support. Next, on the "Application Hub" page, click "New Application" and select "Install from file", specify the path to the archive with the package and install it.

General settings

Create a new notification setting

To configure it, go to the System Designer, in the Sales'Up System Settings block, select the "Notifications" item.

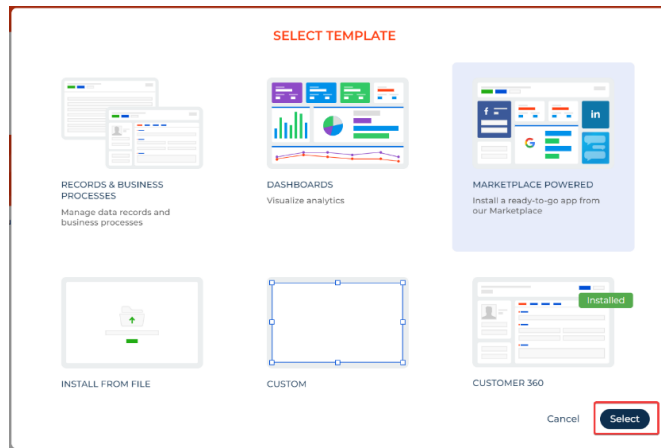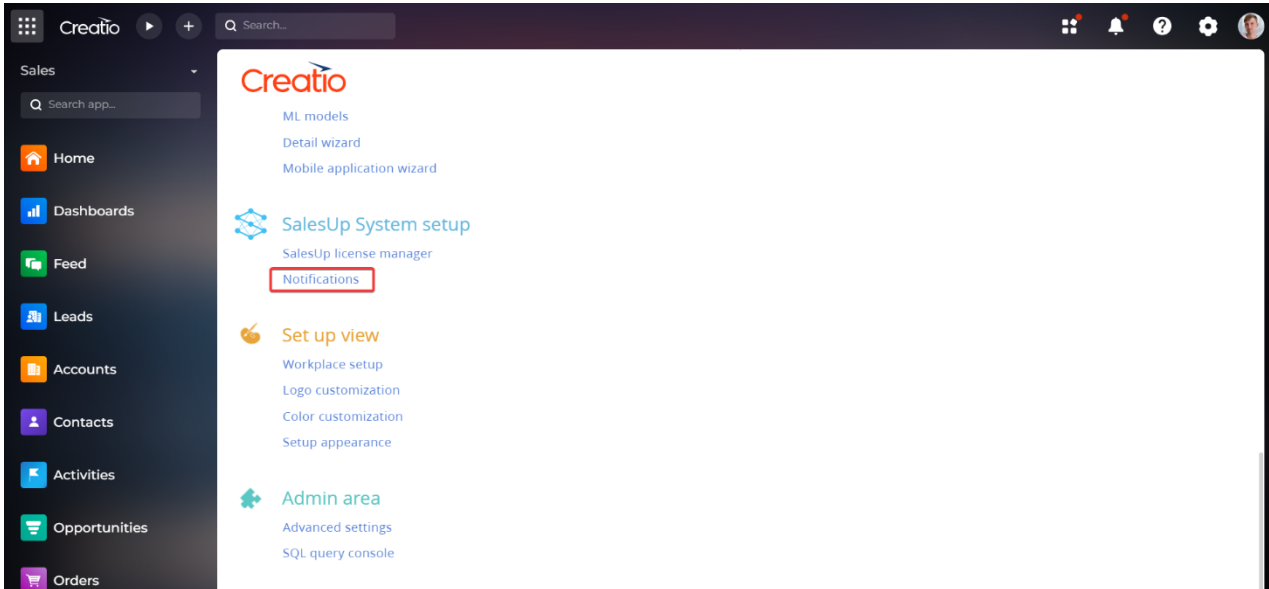To create and configure a notification, click the "Add" button in the registry of the "Notifications" section.

Setup wizard

The Customization Wizard opens when you add a new entry or when you double-click, click on the title of the customization or select a registry entry and click the "Open" button of an existing customization.
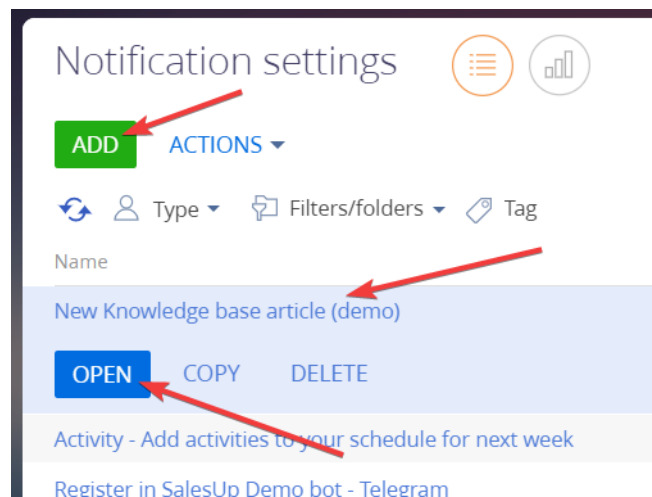
Setting up a page profile

At the first stage of setting up, you need to fill in the required fields:

- **Name** – enter a convenient associative name for the setting to be displayed in the registry;
- **Object** – select the object for which the setting is being created. Any object from the system is available;

Note: after saving the field is blocked.

- **Type** – select the needed notification format. Advanced parameter settings are found on the 'MESSAGE' tab. The following types are available:

  o **Email** – used to send notifications in E-mail format. A feature is the ability to send a notification to any email address, regardless of registration in the system;

  o **Push-notification** – used to send notifications in push format to the Creatio mobile application;

  o **Activity** – setting up automatic creation of activity with pre-filled fields;

  o **Messenger** – used when sending notifications to the Telegram Messenger for contacts, selecting contacts, chats;

  o **Modal box** – setting up notifications in the form of a modal window in the application with the ability to block saving the record;

  o **Notification** – used to send informational messages to system users;
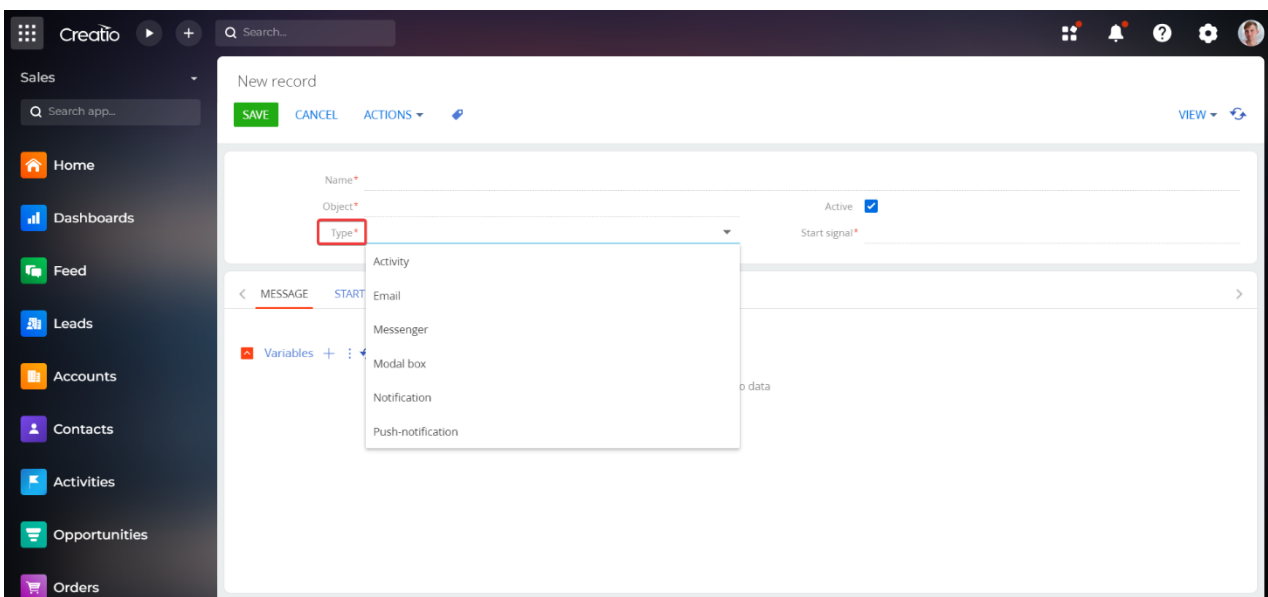
- **Active** – indicates the active status of set up notification

- **Start signal** – select condition for the notification start. The parameter settings are on the "START SIGNAL" tab. The following signals are available:

  o **Date from object column** – setting up notifications based on the date column in the record;

  o **Manual start** – setting up manual start of sending notifications from the object. Requires additional system settings

  o **Object event** – setting up sending notifications based on events that occurred in the object

  o **Page event** – setting up sending notifications based on events that occurred on the page (opening or saving);

  o **Timer** – setting up periodic notifications sending with additional control over parameters.
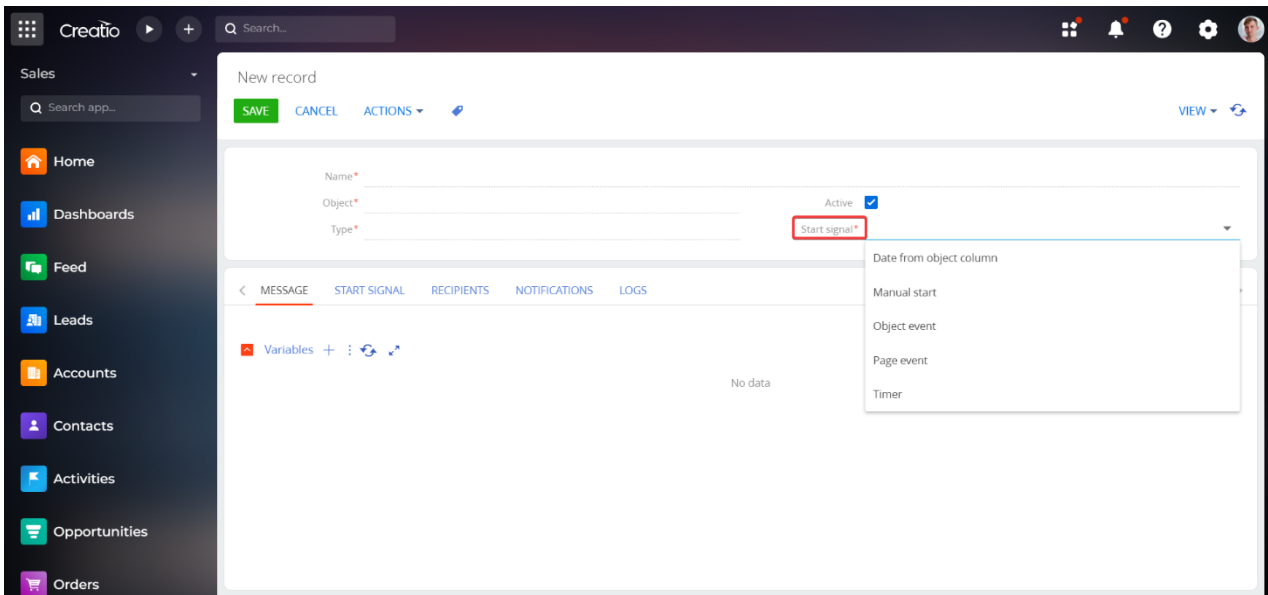
Setting up notification types (Notifications tab)

Email type

- ○ **Email for sending** – selection of a mailbox previously configured in the system for outgoing mail. How to set up, see the instruction: <u>Set up a personal mailbox</u>

- ○ **Email template** – selection of an email template previously created in the system. How to set up, see the instruction: <u>Work with email and chat templates</u>

- ○ **Save email as activity** – option to control the creation of an email-based activity for the recipient.

- ○ **Collective email** – aggregating function that includes many recipients in one letter, if one letter is intended for multiple recipients.

- ○ **Manual sending** – the function is available after activating "Save email as activity". The system creates a letter for recipients and places it in the "drafts" of the mailbox selected in the "E-mail for sending" setting, and informs in the notification panel with the "new message" icon. A user with rights to view this mailbox can send a letter manually, or edit the letter template generated by the system beforehand, and then send it.

- ○ **Activity column values** – the detail is available after activating "Save email as activity". You can add a link to other system objects (case, account,order...) in the detail. Optional to fill.

- ○ **Variables** – objects are added to the part that need to be used to perform aggregate calculations to further display values in the e-mail text (the template has links to these variables). For example, a summary of the number of products in an order. Optional to fill in
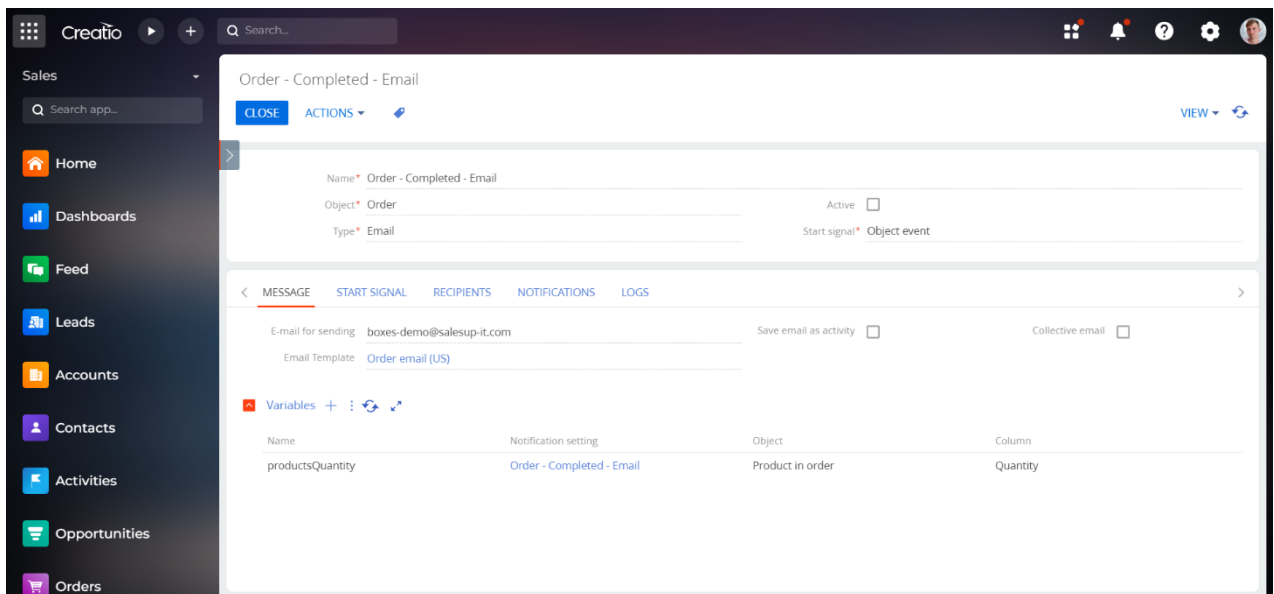
Push-notification type

- ○ **Notification title** – is filled with short text. The use of macros is available, (the standard macros syntax is [#variableName#] . Multilingual filling is available (depends on the selected system language – localization of lookups).

- ○ **Notification text** – is filled with short text. The use of macros is available. Multilingual filling is available (depends on the selected system language – localization of lookups)

- ○ **Notification object column** – allows selecting an object in CRM which should open when you click on the notification. For example, a notification on ProductInOrder, and so that when clicking on the notification, not the Product page opens, but the order page, then we specify the Column of the notification object = Order.

- ○ **Variables** – objects are added to the detail, on which it is necessary to perform aggregation calculations for further display of values in the notification text (there are links to these variables in the template). Implementation example. Optional to fill.
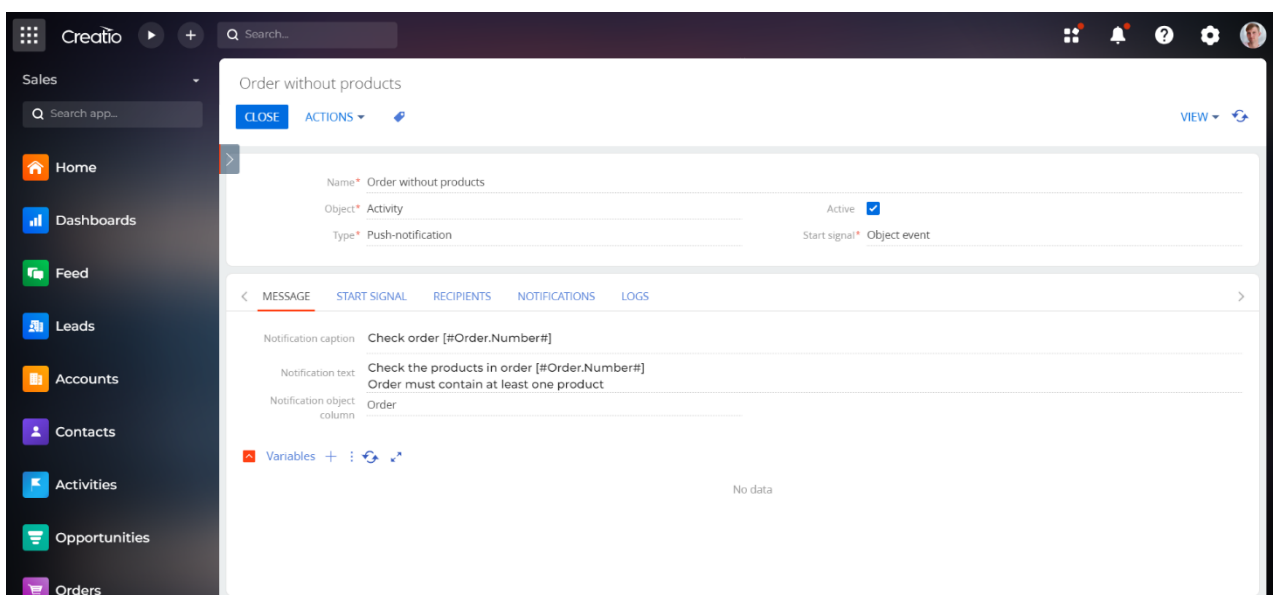
Activity type

- ○ **Activity title** – filled with a short text. The use of macros is available.

o   **Activity column value** – fields are added to the detail and values are selected that will be used when creating the activity. The values are selected: either from the associated object or from the directory, if both fields are filled in, the directory value will not be used by the system. Optional to fill in.

Activity column*	Created by	Object column	Owner
		Lookup value	James Smith

o   **Notification settings variables** – objects are added to the detail for which aggregate calculations are required to further display the values in the activity title text (the template provides links to these variables). Optional for filling in

Messenger type

To send notifications via the following channels:

- SMS;

- Push;

- Telegram;

- Instagram;

- Facebook;

- WhatsApp.

You must first add and configure the appropriate notification channels.

Instructions for setting up each notification channel can be found here.

Modal box type

o   **Message** – filled with text. The use of macros is available. Multilingual filling is available (depends on the selected system language – localization of reference books)

o   **Variables** – objects are added to the detail for which aggregate calculations are required to further display the values in the message text (the template contains references to these variables). Optional for filling in
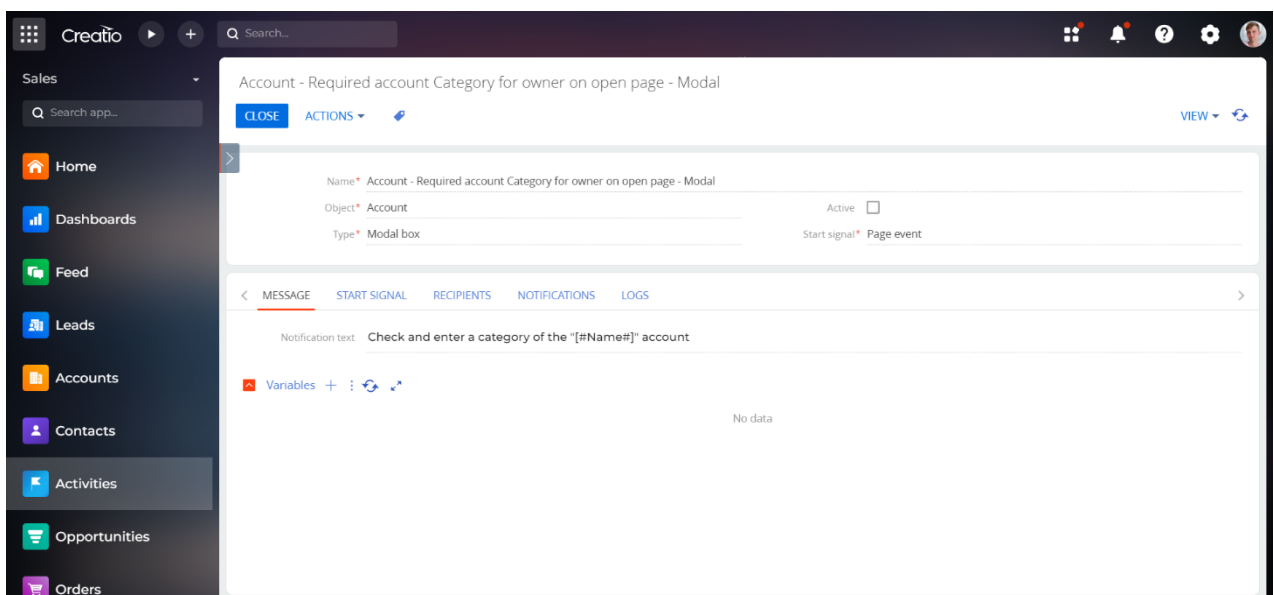
Notification type

- o **Notification caption** – filled with a short text. The use of macros is available. Multilingual filling is available (depends on the selected system language – localization of the reference books)

- o **Notification text** – filled with a short text. The use of macros is available. Multilingual filling is available (depends on the selected system language – localization of reference books)

- o **Notification object column** – allows you to select an object in the CRM that should be opened when you click on the notification. For example, a notification about a Product in an order, and if you want the order page to open instead of the Product page when you click on the notification, you specify the Column of the notification object = Order

- o **Variables** – objects are added to the detail for which it is necessary to perform aggregate calculations to further display the values in the notification text (the template has links to these variables). Optional for filling in

Note: the use of macros in the text of notifications implies the standard macro syntax – [#variableName#]).

Setting up message templates

Before you set up sending notifications with the "Messenger" type, you need to configure a template for communication channels:

- Push;
- SMS;
- Facebook;
- Instagram;
- WhatsApp;
- Telegram.

Setting up a template profile

To add a message template:

1. Go to the "Multichannel message templates" section and click the "Add" button in the section registry;

Multichannel message templates

ADD   ACTIONS ▾

⟳   Filters/folders ▾

2. Fill in the required and optional fields on the template configuration page:

- Template name – specify a unique name for the template for easy identification and searching in the partition registry;

- Message channel type – select one of the communication channels through which the template will be sent;

- Slug (unique identifier string) – after saving the record, the slug is generated automatically based on the template name specified by the user;

- Macro source – Select a system object whose fields can be used in the template as macros. For example, if you want to substitute the recipient's contact name in the message, you should select "Contact" as the source of macros.

Setting up the template text

To personalize the message text in the template, the user has access to custom and standard macros.

For the convenience of creating and editing a future message template, a display in the form of a smartphone screen has been added to the template settings, where the parameters set for the template will be displayed and dynamically changed:

- Text – specify the text of the message that will be displayed to the recipient of the message;

- Image link – if necessary, the user can add a link to an image that will be displayed in the message template to recipients;

- Button caption – specify a name for the template button;

- Button link – specify the website address where the recipient will be redirected to after clicking the button in the template.

After saving the customized template, the user will have access to a preview of the future template, which can be edited if necessary.

Setting up start signals (the "Start signal" tab)

Date from the object column

- o **Date from object column** – sets the date from the field containing the date with the ability to set the offset.

- o **Date column** – select the object field that contains the date;

- o **Offset** – specify the offset interval. The default is 0 (no offset). Values with a "-" sign mean an offset earlier than the selected date, values without a "-" sign mean an offset later than the selected date, respectively.

- o **Offset unit** – selects time units and offsets from minute to month. Required if you select an offset.

- o **Filter** – set a filter to select objects for which notifications will be created
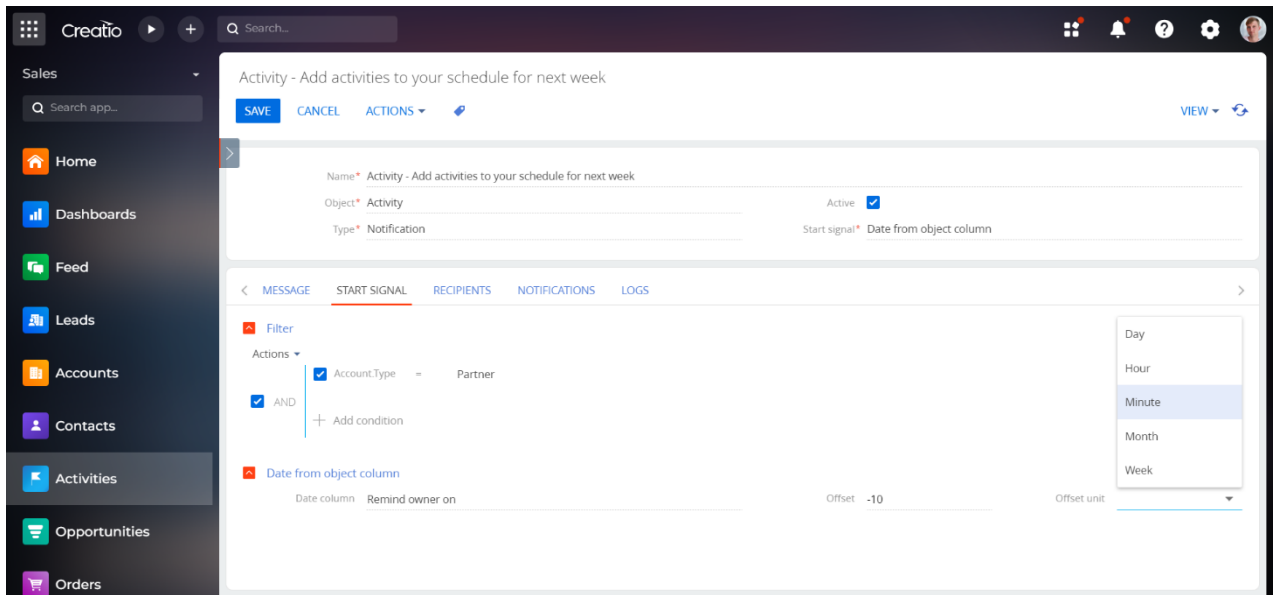
Manual start

It is configured to:

1. A previously created business process that contains the "Send notification" element. For this item, select the appropriate notification setting and "Record Id" from the reference book. The "Record Id" parameter is optional if "Aggregate notification" = Yes). If you bind a business process to a section, the "Send notifications" element will be added to the business process start button
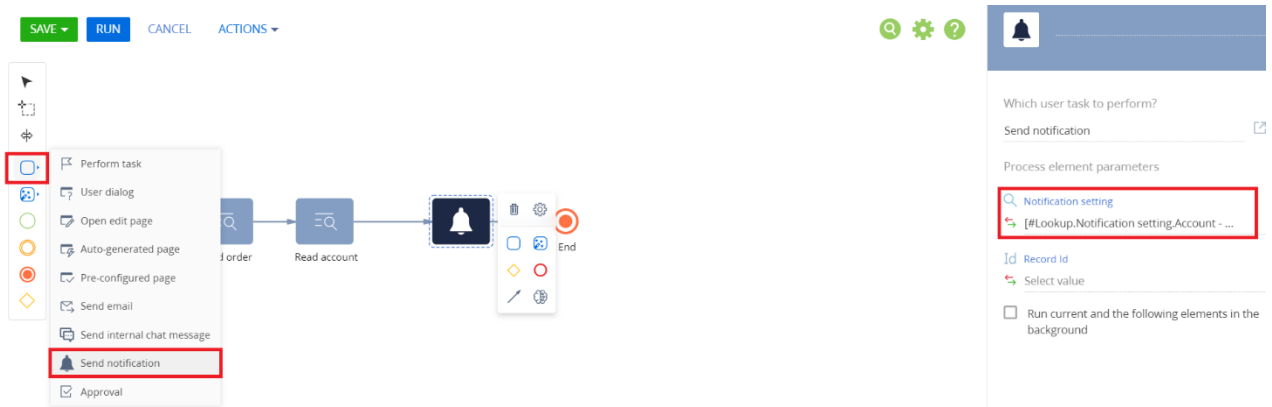
2. The sendSuNotification method previously implemented in the function call code with the parameters "Notification setting id" and "Record id" (the second parameter is optional if "Aggregate notification" = Yes). You can program the function call to the "Action" button in the object or to a custom button.

```
 1    define("SumTradeMarketingPageV2",·["BusinessRuleModule",·"SumJSConstants",·"ServiceHelper"],¬
 2 ▾      function(BusinessRuleModule,·SumJSConstants,·ServiceHelper)·{¬
 3 ▾      return·{¬
 4          entitySchemaName:·"SumTradeMarketing",¬
 5          attributes:·{},¬
 6 ▸        modules:·/**SCHEMA_MODULES*/{▭}/**SCHEMA_MODULES*/·,¬
23 ▸        details:·/**SCHEMA_DETAILS*/{▭}/**SCHEMA_DETAILS*/·,¬
33          businessRules:·/**SCHEMA_BUSINESS_RULES*/{}/**SCHEMA_BUSINESS_RULES*/·,¬
34 ▾        methods:·{¬
35
36 ▾          getActions:·function()·{¬
37              const·actionMenuItems·=·this.callParent(arguments);¬
38 ▾            actionMenuItems.addItem(this.getButtonMenuItem({¬
39                  "Tag":·"sendTMActivityAnalyticsNotification",¬
40                  "Caption":·"Отправить·уведомление·о·ТМ·Активности"¬
41              }));¬
42              return·actionMenuItems;¬
43            },¬
44
45 ▾          sendTMActivityAnalyticsNotification:·function()·{¬
46              const·notificationSettingId·=·"76ab1ab7-1417-4333-a7c6-ffa6d28c223a";¬
47              const·recordId·=·this.get("Id");¬
48              this.sendSuNotification(notificationSettingId,·recordId);¬
49            },¬
50
51          },¬
52          dataModels:·/**SCHEMA_DATA_MODELS*/{}/**SCHEMA_DATA_MODELS*/,¬
53          rules:·{},¬
```

- o **Filter** – set a filter to select the objects for which notifications will be created (if they have the functionality of sending notifications).

- o **Aggregation notification** – allows you to send notifications not for all records that fall under the filter, but only one notification (additionally, you can configure variables for aggregating records in the notification settings). For example, it sends a notification about the number of all invoices issued per day.

- o **Control exists notifications** – activating the setting prevents sending more than one notification for one object, regardless of whether it is included in the filter. For example, a reminder to pay for an order by timer. It is sent once. Even if there is no payment or partial payment (all invoices without full payment fall under the filter), the notification will not be sent again for the next timer period. When the Aggregate notification setting is active, it is not available.
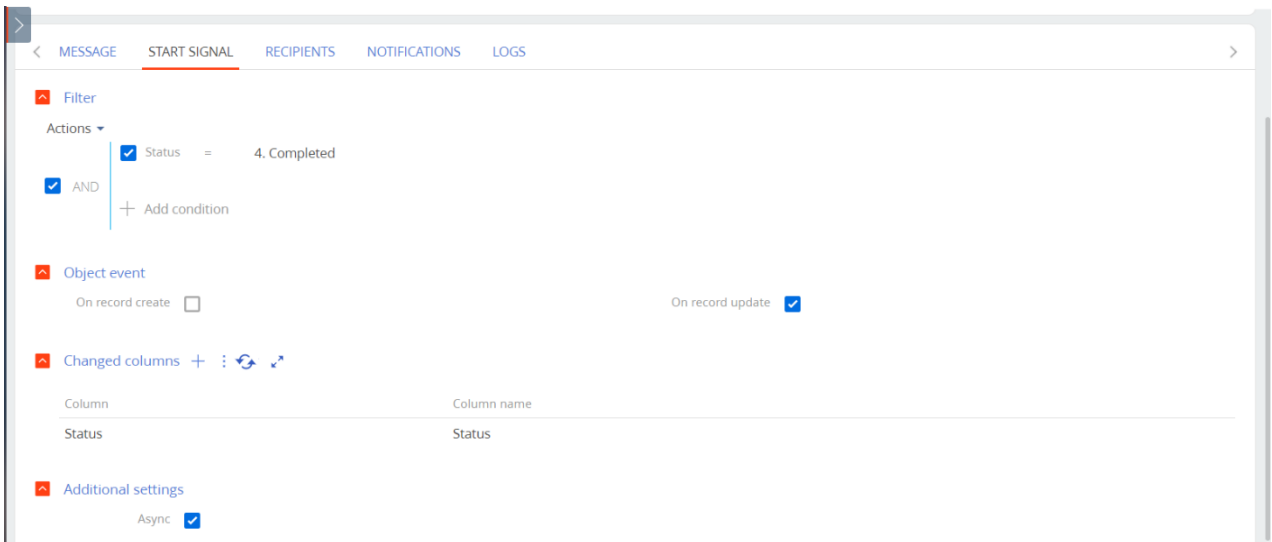
Object event

- o **Filter** – set a filter to select the objects for which the notification will be generated (if they have the functionality of sending notifications).

- **On record create** – the active setting enables the generation of a notification when an object record is created in the registry. It does not preclude activation of the "When a record is changed" setting.

- **On record update** – the active setting enables the generation of a notification when an already created record is changed. It is necessary to specify in detail which columns will be notified when changing.

- **Changed columns** – the detail is required to be filled in when the "When a record is changed" setting is active. Ability to select one or more columns from the object to control changes. The absence of entries in the detail is equivalent to deactivating the "When a record is changed" setting.
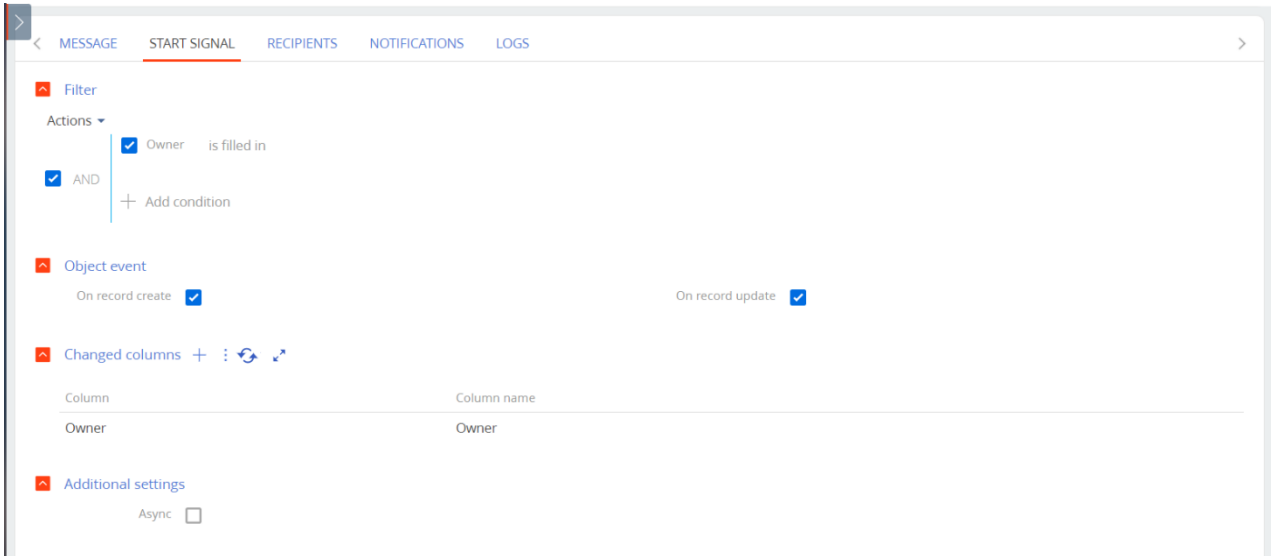
- **Async** – the active option allows you to speed up the process of sending a message. The message is sent in parallel with saving the record (without waiting for the end of saving).

Page event

- **Filter** – set a filter to select objects for which notifications will be generated.

- **On page opened** – activating the setting generates a notification when the page of the object corresponding to the configured filter is opened

- **On record saved** – activation of the setting provides three scenarios for sending a notification:

1. sending a notification at the moment of starting to save the record

2. sending a message when the record is about to be saved and canceling the save (as long as the object matches the filter)

3. sending a question message (generated in the "Notifications" setting) with built-in "Yes" and "No" buttons. When you click "Yes", the object record is saved. If you click on "No", the object record is not saved. It is recommended to use the message type – Modal window
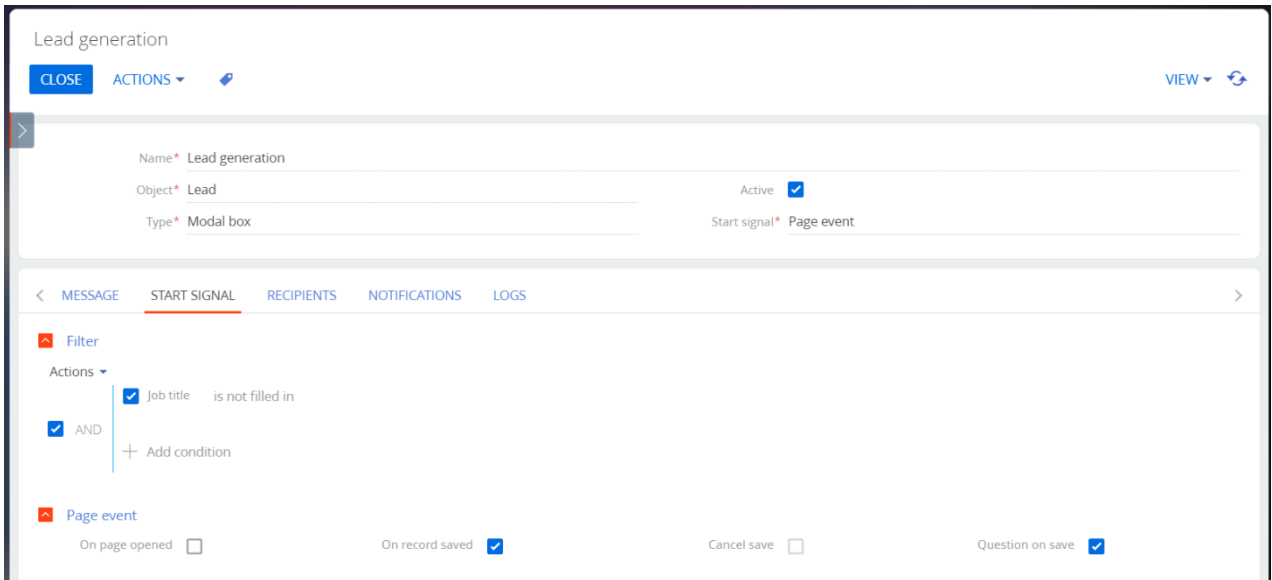
Note: it is possible to simultaneously configure the sending of one message text both when opening a page and when saving (both settings "When opening a page" and "When saving a record" are active).

Timer

- **Filter** – set a filter to select the objects for which the notification will be created.

- **Timer** – set the timer periodicity. Available periods: from a minute to a year and a custom setting.

- **Aggregation notification** – allows you to send notifications not for all records that fall under the filter, but only one notification (additionally, you can configure variables for aggregating records in the notification settings). For example, it sends a notification about the number of all invoices issued per day.

- **Control existing notifications** – activating the setting prevents sending more than one notification for one object, regardless of whether it is included in the filter. For example, a reminder to pay for an order by timer. It is sent once. Even if there is no payment or partial payment (all invoices without full payment fall under the filter), the notification will not be

sent again for the next timer period. When the Aggregate notification setting is active, it is not available.

Timer

Frequency of timer start

Day

Run every

| 1 | day at | 12:00 AM |

Additional settings

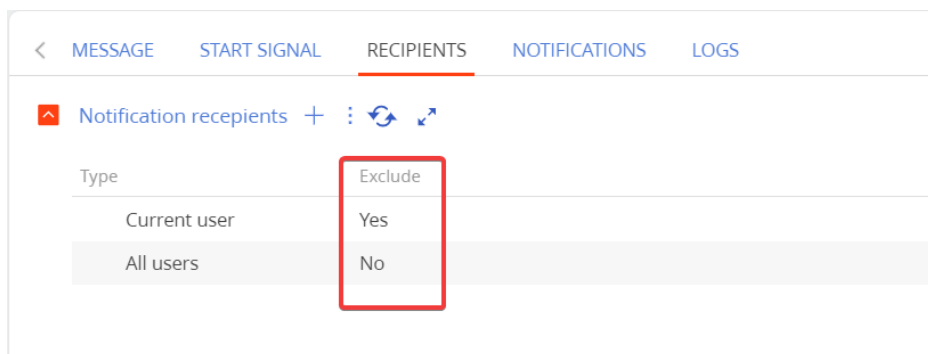Aggregation notification ☐   Control exists ☐
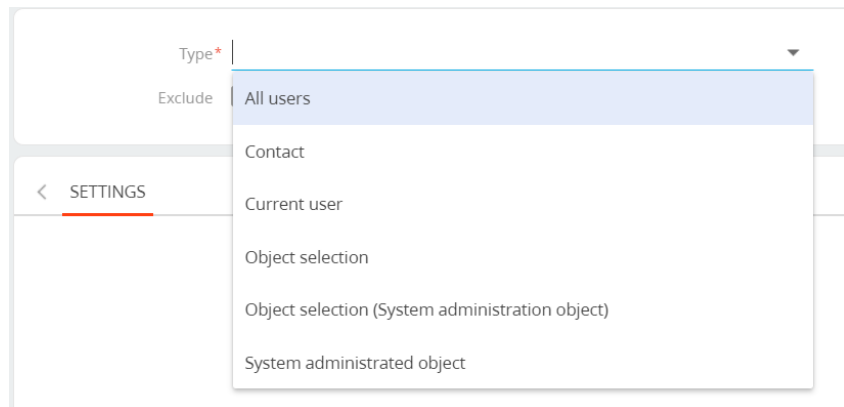   notifications

Setting up recipients

Recipients are configured on the Recipients tab. To add a new record, click the "+" sign on the "Recipients" detail and go to the settings. You can click on the records with users who will receive notifications and records that will exclude users from the mailing list

| ‹ MESSAGE | START SIGNAL | RECIPIENTS | NOTIFICATIONS | LOGS |

Notification recepients + ⋮ ⟳ ⤢

Type	Exclude
Current user	Yes
All users	No

- **Type** – allows you to select the channel for generating the user list. The following types are available for selection:

  o **All users** – all users of the system.

  o **Object section** – allows you to select the user (in the field where only one contact is specified) specified in the column of the current or related object.

  o **Object section (System administration object)** – allows you to select the user(s) (in the field where the System administration object is specified) specified in the column of the current or linked object.

  o **Contact** – selects a static contact from the directory.

  o **System administration object** – select from previously created administration objects.

  o **Current user** – for the system user who will be triggered by the startup signal while working with the system.

- **Column –** selects the column of the current or related object indicating the contact, user, or administration object. Available for types: "Selection from object", "Selection from object (Administration object)", "Contact", "Administration object»

- **Exclusions** – an additional setting that allows you to specify a list of contacts to whom you do NOT send messages. For example, if you send a notification to a department about a colleague's birthday, the contact of the department employee whose birthday it is is excluded from the notification. It doesn't work on its own without setting up who to send to

Note: To send an email notification outside the system (to the email address of a contact who is not a user of the system), you need to create a contact in the "Contacts" section and specify the email address of the future recipient of the notification. Next, in the recipients settings, select the "Contact" type and specify the created contact to whose email address the notification should be sent.

Analytics and logging

Viewing the analytics of sending notifications according to the current setting

On the "Notifications" tab, the "Notifications" detail will display a list of notifications that have been sent according to the current setting

View errors when sending notifications according to the current setting

On the "Logs" tab, in the "Notification logs" detail, you can view the error log for the current notification setting.

	MESSAGE	START SIGNAL	RECIPIENTS	NOTIFICATIONS	LOGS	

Notifications log ⋮ ↻ ⤢

Created on ⌄	Record Id	Message
8/30/2023 3:30 PM	e0bb123c-f46b-1410-ee89-00155d043204	Error: Method not found: 'Boolean SalesUp.StringFormation.SuStringFormationHelper.TryGetStringColumnsForChange(Terrasoft.Core.Entities.Entity, Terrasoft.Core.Entities.EntityColumnValueCollection, System.Collections.Generic.Dictionary`2<System.String,System.String> ByRef)'.
8/30/2023 3:30 PM	e0bb123c-f46b-1410-ee89-00155d043204	Error: Method not found: 'Boolean SalesUp.StringFormation.SuStringFormationHelper.TryGetStringColumnsForChange(Terrasoft.Core.Entities.Entity, Terrasoft.Core.Entities.EntityColumnValueCollection, System.Collections.Generic.Dictionary`2<System.String,System.String> ByRef)'.
8/30/2023 3:30 PM	e0bb123c-f46b-1410-ee89-00155d043204	Error: Method not found: 'Boolean SalesUp.StringFormation.SuStringFormationHelper.TryGetStringColumnsForChange(Terrasoft.Core.Entities.Entity, Terrasoft.Core.Entities.EntityColumnValueCollection, System.Collections.Generic.Dictionary`2<System.String,System.String> ByRef)'.
8/30/2023 3:30 PM	e0bb123c-f46b-1410-ee89-00155d043204	Error: Method not found: 'Boolean SalesUp.StringFormation.SuStringFormationHelper.TryGetStringColumnsForChange(Terrasoft.Core.Entities.Entity, Terrasoft.Core.Entities.EntityColumnValueCollection, System.Collections.Generic.Dictionary`2<System.String,System.String> ByRef)'.
8/30/2023 3:30 PM	e0bb123c-f46b-1410-ee89-00155d043204	Error: Method not found: 'Boolean SalesUp.StringFormation.SuStringFormationHelper.TryGetStringColumnsForChange(Terrasoft.Core.Entities.Entity,

Notifications log ↻ ⤢

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